

The Mailing Designer is the gateway for creating and publishing content in Informz. Previously, several types of mailings were available under different names. Now all of the features for those types of mailings have been wrapped into a single mailing-creation process. The Mailing Designer utilizes the Informz editor, which works more like a word processor and less like an HTML editor.

## BROWSER REQUIREMENTS

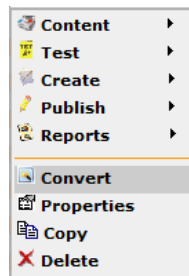
To use the Java Editor, there are some minimal web browser requirements: Internet Explorer 7+, Firefox 3.0+, or Safari 3.0+. It is recommended that the latest version of any web browser be used for the best experience.

Informz is optimized for use with the latest version of the Firefox browser. Other browsers can be used, but Firefox will provide the best experience.

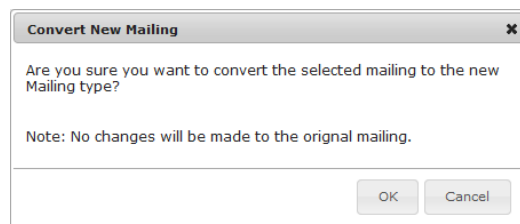
## CONVERTING EXISTING MAILINGS TO THE NEW FORMAT

To use the new Mailing Designer to modify existing Quickmails or Newsletters, first convert the mailing to the new format. Converting an existing mailing creates a copy in the new format while preserving the existing version.

Place your cursor on the **Envelope** icon for the mailing to view this pop-up menu:

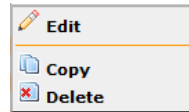


Click the **Convert** option, and this pop-up appears:



Click the **OK** button. A new mailing appears at the top of the list. Its name is the same as the original with words "New Format" preceding it.

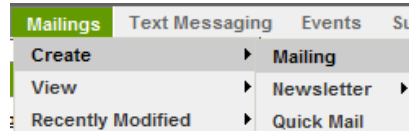
Place your cursor over the envelope of the new Mailing, and a simpler pop-up appears:



Select **Edit** to open the converted Quickmail or Newsletter in the new Mailing format.

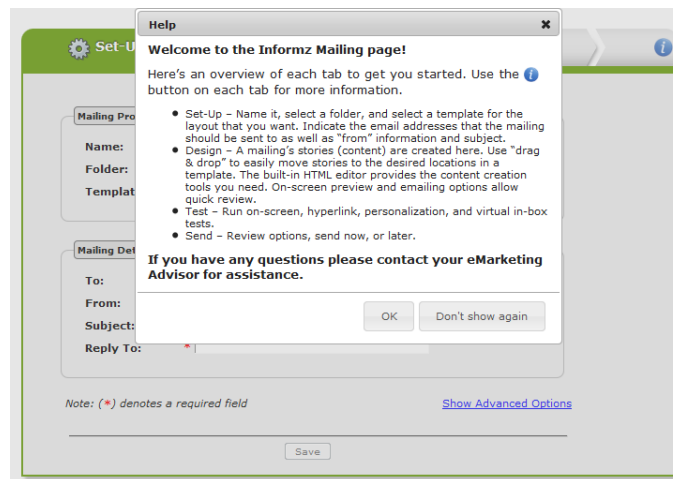
## CREATING A NEW MAILING

From the Mailings menu, go to *Create -> Mailing*.

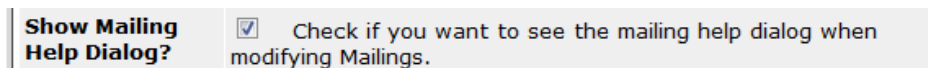


## STARTING THE MAILING PAGE FOR THE FIRST TIME

Clicking the *Create -> Mailing* menu or **Edit** from the **Mailing** pop-up menu launches the Mailing Designer.



This Help screen appears automatically. Click **OK** to dismiss it or click **Don't Show Again** to skip it. If **Don't Show Again** is accidentally clicked, it can be turned back on from *Preferences* on the top line menu under your user name:



## THE TABS

The Mailing Designer has four tabs plus a context-sensitive Help button. The tab that is currently active is colored green. Some tabs have additional options on the green bar directly below the tabs.



The **Set-Up** tab contains options for controlling templates, Target Groups, etc.

The **Design** tab is where the layout and content of the Mailings are managed.

The **Test** tab is used for sending email tests, checking hyperlinks, using the virtual inbox, etc.

The **Send** tab sets the options for when the Mailing will be sent.

An information icon exists on the right side for each tab to provide an overview about the tab.

## THE SET-UP TAB

The **Set-up** tab appears below:

Properties	
Name:	<input type="text"/>
Folder:	Main Folder: <input type="text"/>
Template:	Select a template... <input type="text"/>
A/B Testing:	None <input type="button" value="EDIT"/>

Envelope	
To:	<input type="text"/> <input type="button" value="EDIT"/>
From:	<input type="text"/> <input type="button" value="EDIT"/>
Subject:	<input type="text"/> <input type="button" value="EDIT"/>
Reply To:	<input type="text"/>

Advanced	
Cc (Test Group):	Not Set <input type="button" value="EDIT"/>
Do not send to:	Not Set <input type="button" value="EDIT"/>
Content entry:	HTML Editor <input type="text"/>
Accounting Code:	test <input type="text"/>
Tentative Send Date:	<input type="text"/> <input type="button" value="EDIT"/>

## PROPERTIES

**Name:** This is the name of the Mailing. This name is never seen by recipients, and it is only used within Informz.

**Folder:** This is where the Mailing is stored. Clicking the **Folder** icon to the right of the **Folder** drop-down menu allows the quick creation of a new folder.

**Template:** Either Standard or Advanced templates can be used with a Mailing. Once the template is chosen, the default **From** and **Reply-To** information for this template is added to the **Envelope** section. These default values can be overwritten for this Mailing using the **Edit** button. If a template is initially selected and then later a different template is chosen for that Mailing, these values change to the default for the newly selected template. Once a template is selected for a Mailing, a small icon appears next to the template name, which allows the user to click it and edit the template.

**A/B Testing:** The user can test different parts of the Mailing by sending variations of the Mailing to subsets of the target group. The results can be analyzed to see which content brought better subscriber responses. A/B Testing is discussed in more detail later in this document.

## ENVELOPE

**To:** The Mailing must have a target: either choose a target group for the entire Mailing, a list of email addresses, or separately target each story to a different target group. Clicking **Edit** or clicking the **To** box shows the **To Information** pop-up.

The 1<sup>st</sup> option calls for one target group for the entire Mailing; however, the Mailing can contain multiple stories. With this choice, target groups need not be assigned individually when adding stories.

**To Information** ✕

Select the Recipients of your mailing

☒ Select the Target Group for the entire mailing

Step 1: Interests

Step 2: Special Target [Get Count](#)

☐ Specify the Target Group for each Story \*

☐ Enter a list of email addresses for the entire mailing

Notes:

\* Story level targeting cannot be used with "Test All Stories" A/B testing.

Update Cancel

Selecting the 2<sup>nd</sup> option sets the **To** box as "Story Level." Thereafter, a target group must be assigned to each story as it is created.

Selecting the 3<sup>rd</sup> option requires a short list of email addresses to which the Mailing is sent when published. Each email address must be listed on its own line. Lists of more than 15 addresses must be handled with a target group.

**To Information** ✕

Select the Recipients of your mailing

☐ Select the Target Group for the entire mailing

☐ Specify the Target Group for each Story \*

☒ Enter a list of email addresses for the entire mailing

user@informz.com

Add one email address per line, no more than 15.

Notes:

\* Story level targeting cannot be used with "Test All Stories" A/B testing.

Update Cancel

**From:** After selecting the **To** information, the **From** information is also specified from a pop-up window. Clicking **Edit** or clicking on the **From** box brings up this window:

**From Information** ✕

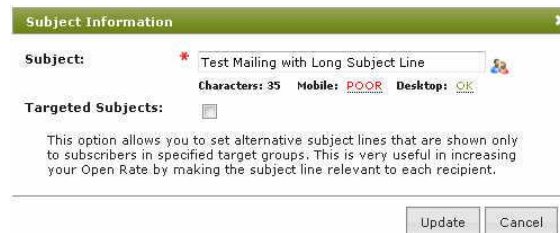
Email Address: \* help@informz.com

Friendly From: \* eMarketing Advisor

Update Cancel

The **Email Address** is required and must use a valid email address format. The **Friendly From** is the name the subscriber initially sees in the From portion of the email, so use something that is clearly recognizable as being from the sending person or organization.

**Subject:** The **Subject Line** sets the subject line that the email recipient sees. Enter a relevant and compelling subject line for the audience. Note that a Subject Line Tester has been added. The tester simply looks at the length of the subject line and reminds the user that keeping the subject line short works better, especial for users of mobile technology.



**Subject Information** [X]

**Subject:** \* Test Mailing with Long Subject Line [icon]

Characters: 35 Mobile: **POOR** Desktop: **OK**

**Targeted Subjects:** ☐

This option allows you to set alternative subject lines that are shown only to subscribers in specified target groups. This is very useful in increasing your Open Rate by making the subject line relevant to each recipient.

[Update] [Cancel]

**Reply To:** The **Reply To** is set initially from the Template. Enter an email address that should receive replies to the Mailing.

## ADVANCED

**CC: (Test Group):** Test group feature allows additional recipients to receive a tested or published Mailing. These additional recipients are sometimes referred to as a Test Group. Clicking the **Edit** button or the **CC: box** on the **Advanced Options** screen brings up this pop-up:



**Also Send Mailing To** [X]

Choose a Test Group or create a new one.

☒ Create a Test Group

Test Group Name: Test Group 1

test\_email\_1@domain.com  
test\_email\_2@domain.com

Add one email address per line, no more than 15. This test group list will be saved when Update is selected.

☐ Choose a Test Group

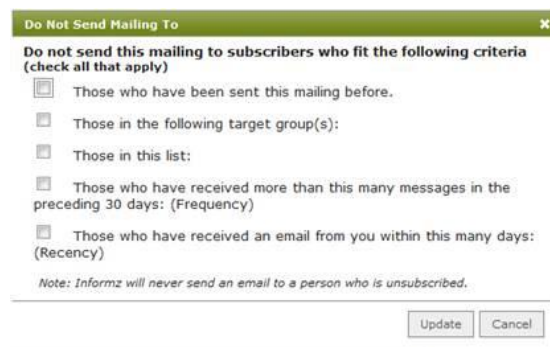
[Update] [Cancel]

The **Create a Test Group** radio button displays a means to create a new test group, as well as to add email addresses to an existing test group. Once the test group name and the email addresses are set, this test group is available for use with future Mailings. Addresses can be added or removed from the list here; those changes are reflected when the **Update** button is clicked.



Select the **Choose a Test Group** radio button to see a list of currently available test groups. The email addresses for each test group are displayed when the test group is selected. Addresses can be added, deleted, or edited here as well. After finishing updating the **Set-up** tab, click the **Save** button and then proceed to the **Design** tab.

**Do Not Send:** Just as a user can specify additional recipients for a Mailing, recipients can be excluded using the window.

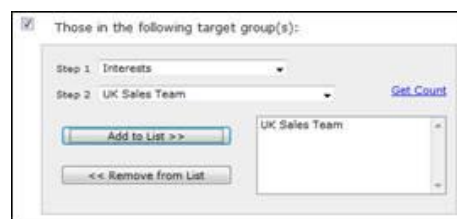


#### OPTION 1: THOSE WHO HAVE BEEN SENT THIS MAILING BEFORE

Selecting this option excludes from the recipient list anyone who has previously received this Mailing. (Note: this does not work for copies of already published Mailings. It only works for subsequent publishing of a single Mailing.)

#### OPTION 2: THOSE IN THE FOLLOWING TARGET GROUP(S)

This option enables target groups to be used as filters against receiving the Mailing. This is very useful for clients who wish to use Opt-Outs: an Opt-Out interest can be created as a filter for each target group, and all subscribers who wish to opt-out would be added to that Opt-Out interest.



*OPTION 3: THOSE IN THIS LIST*

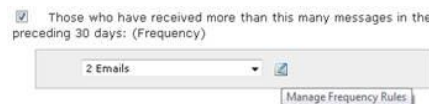
This provides a way to remove individuals who should not receive the Mailing by manually entering their email addresses.



A screenshot of a web form titled "Those in this list:". It contains a text area with two email addresses: "ExecutiveDirector@MyAssoc.org" and "OurCFO@MyAssoc.org". Below the text area is a small instruction: "Add one email address per line, no more than 15."

*OPTION 4: FREQUENCY RESTRICTIONS*

This option displays only if at least one Frequency rule exists. Select the Frequency Rule from the dropdown menu to apply to this Mailing. Click the icon to the right of the dropdown menu to create or edit current Frequencies rules associated with the account.



A screenshot of a web form titled "Those who have received more than this many messages in the preceding 30 days: (Frequency)". It features a dropdown menu set to "2 Emails" and a small icon to its right. Below the dropdown is a button labeled "Manage Frequency Rules".

*OPTION 5: RECENCY RESTRICTIONS*

This option displays only if at least one Recency rule exists. Select the Recency Rule from the dropdown menu to apply to this Mailing. Click the icon to the right of the dropdown menu to create or edit current Recency rules associated with the account.



A screenshot of a web form titled "Those who have received an email from you within this many days: (Recency)". It features a dropdown menu set to "30 Days" and a small icon to its right. Below the dropdown is a button labeled "Manage Recency Rules".

**Content Entry Method:** The Content Entry Method allows content to be created either by using the Informz editor or by pasting in previously created HTML.



A screenshot of a dropdown menu labeled "Content entry method:". The menu is open, showing three options: "HTML Editor", "HTML Editor", and "Paste HTML Code". The "Paste HTML Code" option is highlighted in blue.

If the **Paste HTML Code** method is selected, the **Story** area looks like this:

The screenshot shows a web interface for creating a mailing. At the top, there's a green header bar with the text "Mailing Story - Location: EMPLOYEES CONTENT HERE". Below this, there are two tabs: "step 1: Interests" and "step 2: Basic Members". A "Get Content" button is located next to the tabs. The main area is divided into two sections: "HTML: Content" and "Text:". Both sections have large text input areas. At the bottom, there is a small note: "Note: To use the HTML Editor, return to the Set-up tab to change the Content Entry Method."

The images above are slightly different when pasting HTML directly into a Quickmail or Newsletter, but the process is the same.

**Accounting Code:** The **Accounting Code** option allows the user to select an internal “bill-back” code so that mailings can be charged accordingly to the appropriate department. To create an Accounting Code, select *Admin -> Setup -> Mailing Accounting Codes -> View All*. You can also manage Accounting Codes by clicking on the small icon to the right of the dropdown.

The screenshot shows a dropdown menu labeled "Accounting Code:". The selected option is "Fibonacci", which is preceded by a red asterisk. To the right of the dropdown is a small icon.

If the **Accounting Code** feature is enabled for your account, each and every mailing that is published from that account must have an Accounting Code assigned to it.

**Tentative Send Date:** The **Tentative Send Date** option allows a user to input a date and time when the mailing is expected to be published. This time and date becomes associated with the Mailing, and it also appears on the **Calendar View** of the **Mailing List** page, allowing other users in the organization to know when the mailing will be published. This encourages better cooperation and information-sharing between users to coordinate campaign efforts.

The screenshot shows a date and time selection interface. At the top, it says "June 2012". Below this is a calendar grid with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates (1 through 30). The date "18" is highlighted. Below the calendar, there is a "Time" field set to "12:00 am". Underneath the time field are two sliders for "Hour" and "Minute". At the bottom, there are two buttons: "Now" and "Done".

To set the tentative send date and time, simply click on the date and use the sliders to select the hour and minute. Click the **Done** button when finished. If the mailing is going to be sent immediately after being created, click the **Now** button.



By default, the **Tentative Send Date** function is available in an account but not required. However, it is possible to make the Tentative Send Date a required field when creating a Mailing. Contact your eMarketing Advisor if this should be a required field in your account.

## TARGETED SUBJECT LINES

All Mailings have **subject lines**. In addition to the standard subject lines, a user can set up targeted subject lines for Mailings. Targeted subject lines involve sending different subject lines to a subset of the subscribers receiving the Mailing.

When the **Use Targeted Subjects** checkbox is checked, the window opens to reveal the functionality that allows targeted subject lines to be added.

The screenshot shows a window titled "Subject Information" with a close button (X) in the top right corner. Inside the window, there is a "Default Subject:" label followed by a text input field containing "Default Subject Line". Below this is a "Use Targeted Subjects:" label followed by a checked checkbox. A descriptive text block explains: "This option allows you to set alternative subject lines that are shown only to subscribers in specified target groups. This is very useful in increasing your Open Rate by making the subject line relevant to each recipient." Below the text is a "Target:" section with two dropdown menus: "Step 1" set to "Interests" and "Step 2" set to "Events Registrants". To the right of the dropdowns are minus, plus, and delete icons. Below the dropdowns is a blue link that says "+ Add Targeted Subject". At the bottom of the window, a note states: "If a recipient matches more than one targeted subject they will receive the one higher up the list. If a recipient does not match any targeted subject they will receive the default subject." At the very bottom are "Update" and "Cancel" buttons.

**Default Subject:** In the **Default Subject** area, input the subject line to be used for the main target.

**Subject:** In the **Default Subject** area, input the targeted subject line to be used.

**Target:** In the **Target** drop-downs, select the target group to be used to target the alternate subject line. Note that only subscribers in the original target group will the targeted subject line, even if they are in the target group for the targeted subject line.

More than one targeted subject line can be added for a Mailing. Click the **+ Add Targeted Subject** link to add additional targeted subject lines to a Mailing. Those additional subject lines appear further down in the list.

Subject Information

Default Subject:

Default Subject Line

Use Targeted Subjects:

☒

This option allows you to set alternative subject lines that are shown only to subscribers in specified target groups. This is very useful in increasing your Open Rate by making the subject line relevant to each recipient.

Subject : Targeted Subject Line

Target :

Step 1 Interests

Step 2 Events Registrants

Subject : Second Targeted Subject Line

Target :

Step 1 Action-Based

Step 2 Complete the client survey

+ Add Targeted Subject

If a recipient matches more than one targeted subject they will receive the one higher up the list. If a recipient does not match any targeted subject they will receive the default subject.

Update

Cancel

If a subscriber fits into more than one target group, that subscriber receives the highest targeted subject line on the list for which the subscriber qualifies. Anyone targeted in the Mailing who is not in any of the targeted subject line groups receives the original subject line.

## A/B TESTING

A/B Testing is a tool used to test the reception of content by a subscriber base. The normal version of the content (Version A) is sent to part of the base, while alternative content (Version B) is sent to a subset. Then the results can be compared to see what kinds of content get a better response. For more information on how to best use A/B Testing, contact your eMarketing Advisor.

The A/B Testing Information window allows the user to choose which content will be tested with the A/B Testing:

**A/B Testing Information**

**A/B Testing Options**

Type:

- ☒ None
- ☐ Friendly From
- ☐ Subject Line \*
- ☐ Test One Story
- ☐ Test All Stories \*\*

Notes:

\* Subject line testing cannot be used with targeted subject lines.

\*\* Test all stories cannot be used with story level targeting.

Update Cancel

**None** means no A/B testing will be done in the Mailing.

**Friendly From** allows the user to set alternative Friendly From text.

**Subject Line** allows the user to create an alternative subject line. (This differs from targeted subject lines in that this splits the two subject lines randomly among the subscribers, whereas targeted subject lines are specifically targeted and not randomly set.)

**Test One Story** gives the user the means to create one alternative story that will be inserted instead of another one.

**Test All Stories** gives the user the means to create alternatives to every story in the Mailing.

## FRIENDLY FROM

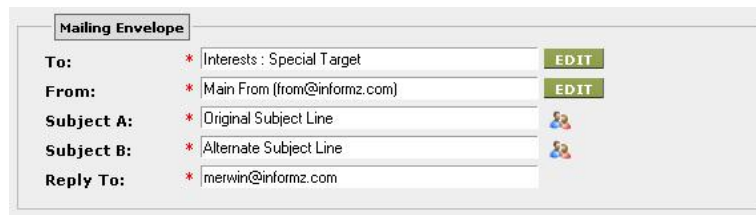
When the Friendly From radio button is selected, a second From line appears, allowing the user to create an original **From** line (From A) as well as an alternative **From** line (From B). When the Mailing is published, the target group is split in half, and each half receives a different **From** line.

**Mailing Envelope**

<b>To:</b>	*	Interests : Special Target	EDIT
<b>From A:</b>	*	Main From (from@informz.com)	EDIT
<b>From B:</b>	*	Alternate From (alternate@informz.com)	EDIT
<b>Subject:</b>	*	Subject Line	EDIT
<b>Reply To:</b>	*	merwin@informz.com	

## SUBJECT LINE

When the **Subject Line** radio button is selected, a second Subject Line input box appears, allowing the user to create an original subject line (Subject Line A) as well as an alternative subject line (Subject Line B). When the Mailing is published, the target group is split in half, and each half receives a different subject line.



The image shows a 'Mailing Envelope' form with the following fields and values:

Field	Value	Action
To:	* Interests : Special Target	EDIT
From:	* Main From (from@informz.com)	EDIT
Subject A:	* Original Subject Line	
Subject B:	* Alternate Subject Line	
Reply To:	* merwin@informz.com	

## TEST ONE STORY/TEST ALL STORIES

A/B Testing is a tool used to test the reception of content by a subscriber base. The normal version of the content (Version A) is sent to part of the base, while alternative content (Version B) is sent to a subset. Then the results can be compared to see what kinds of content get a better response. For more information on how to best use A/B Testing, contact your eMarketing Advisor.

The A/B Testing Information window allows the user to choose which content will be tested with the A/B Testing:



The image shows the 'A/B Testing Information' dialog box with the following options:

**A/B Testing Options**

Type:

- ☒ None
- ☐ Friendly From
- ☐ Subject Line \*
- ☐ Test One Story
- ☐ Test All Stories \*\*

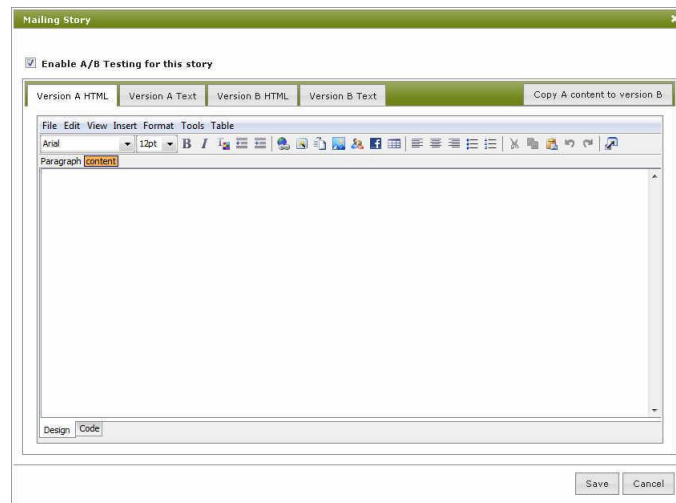
Notes:

- \* Subject line testing cannot be used with targeted subject lines.
- \*\* Test all stories cannot be used with story level targeting.

Buttons: Update, Cancel

*TEST ONE STORY*

When the Test One Story radio button is selected, the Story Creation section of the Mailing Designer page is altered:



Note that tabs have been added to the screen that allow the user to input the different versions of the story. When the Mailing is published, part of the Target Group receive Story A and part receive Story B.

*TEST ALL STORIES*

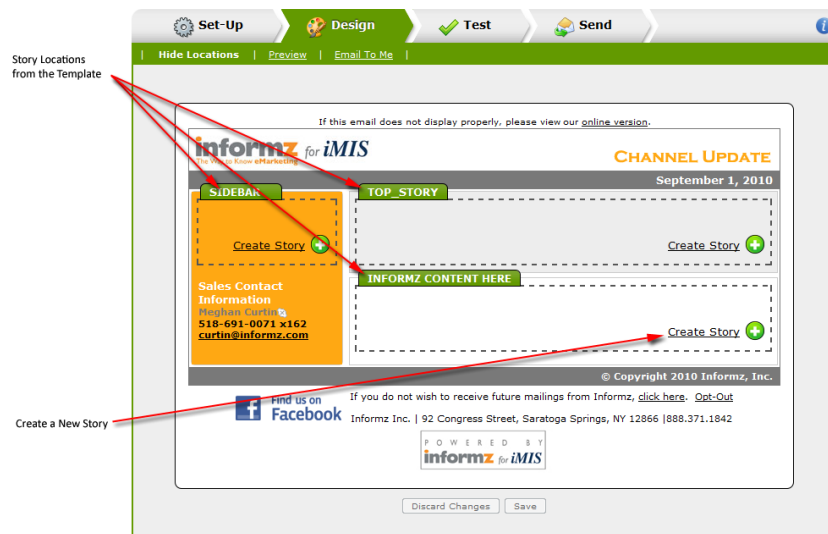
When the Test All Stories radio button is selected, the Story Creation section of the Mailing Designer page is altered in the same way shown above. However, in this case, a B version can be created for more than one story in the Mailing. When the Mailing is published, all of the A versions of the stories will go to one group, and all of the B versions will go to rest of the targeted subscribers.

When stories are targeted (either one story or multiple stories, the places in the Mailing Designer page that allow a user to preview the Mailing will have buttons or links that allow the user to toggle between viewing the A version and the B version.

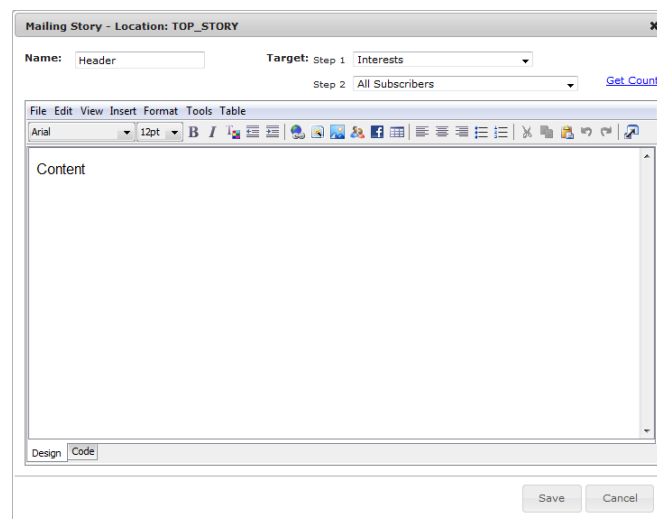
## DESIGN TAB

The **Design** tab holds the area where Mailings are designed visually. Each story location set in the template is noted with the name of that location. Each location also has a **Create Story** link to add a new story in that location. A Standard template has only one location, while an Advanced template can have any number of locations.

The **Design** tab is shown below.



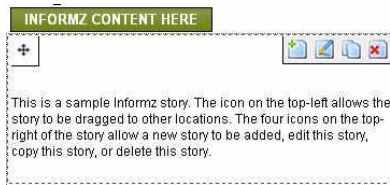
Clicking the **Create Story** link brings up this pop-up:



Note:

- The **Name of the Story** is only used if the Template has a table of contents.
- The **Target** section is displayed only if story-level targeting was selected in the **Set-up** tab.

When **Save** is clicked for a story, the **Design** tab re-appears with the content of the new story displayed. After a story is initially created, the story appears within the template in the Design tab.



Putting your mouse over a story brings up a mini-toolbar for the story. This mini-toolbar provides the following options: add a new story in the same location, edit the story, move the story to a different location, and delete the story.

In addition to the mini toolbar, double-clicking on a story allows the editing of that story. Moving a story is accomplished by drag and drop. Stories can be moved between locations or within a location.

When the Mailing is completed, or whenever changes need to be saved, click the **Save** button at the bottom of the page.

## THE EDITOR

A specialized toolbar has been implemented for use with stories in a Mailing. This toolbar contains all of the functionality of the simpler toolbar, plus extra features.



A few of the buttons on the Informz Editor Toolbar contain special functionality specific to Informz:



**Insert Hyperlink:** This allows the user to insert hyperlinks into the content, including password-protected links or specials links to Informz specific features like ballots, surveys, or events.



**Insert Social Media Links:** Links to social media sites like Twitter, Facebook, and Linked-In can be added to content.



**Insert Personalization:** Information about subscribers that is held in the database or collected based on subscriber interaction can be seeded into content.



**Insert Content Code:** Special codes can be inserted into Informz content to note dynamic time/date stamps, specially formatted areas, or other features.



**Content Manager:** The content held in an account's Content Manager section can be accessed and utilized via this button.



**RSS Feed:** The content from an RSS feed can be added to the content of a story.



**Text Version:** The text version of a piece of content can be created automatically and then edited via this button.

The editor also has a number of extra features:

### 1. Inline spell checking

A misspelled word appears with a red underline. Right-clicking on it shows a list of possible correct spellings. Select the correct spelling from the list to replace the misspelled word.

### 2. Inline image editing

Clicking on an image brings up the image mini-toolbar. Images can be edited in a variety of ways: crop the image, add rounded corners, add a shadow, add a mirror image or flip the image. Note that after editing an image, upon saving the story, the edited image is uploaded to Informz under a new name, preserving your original image. The image size can be increased beyond Informz's acceptable limits, so the image might need to be altered.



### 3. Pasting images

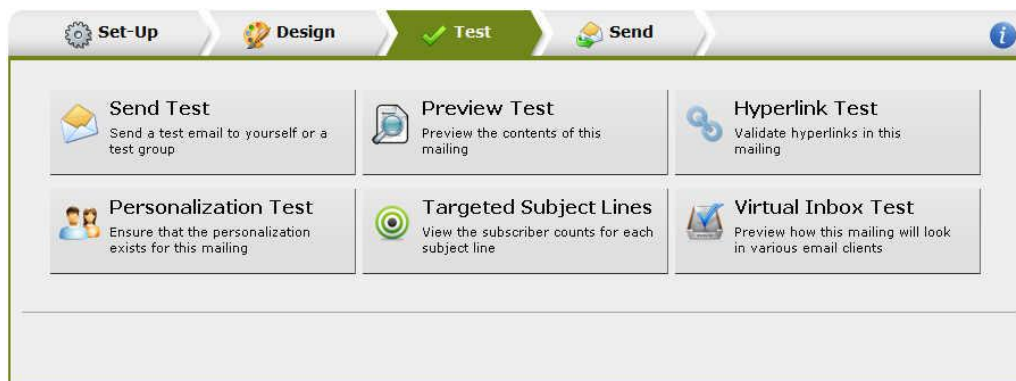
Images can be copied from a web site or from your computer and pasted into the **Design** tab of the editor. The image is uploaded to Informz when the **Save** button is clicked.

### 4. Pasting content that includes images

Content (including images) can be pasted directly into the **Design** tab. The image is uploaded to Informz when the **Save** button is clicked.

## TEST TAB

The **Test** tab allows six types of tests to be performed on a mailing. These are Send, Preview, Hyperlink, Personalization, Targeted Subject Lines and Virtual Inbox.

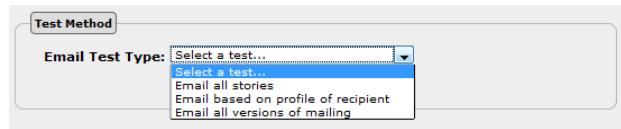


## SEND TEST

Send yourself or others (including a Test Group) the Mailing. These are the testing choices:

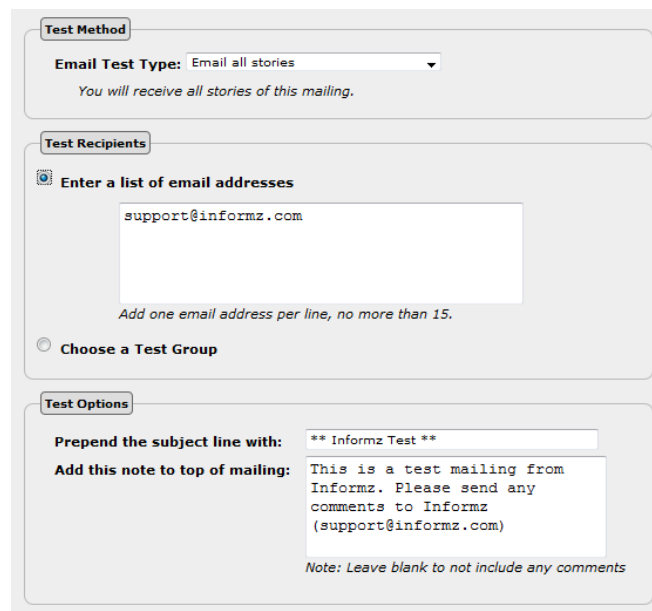
- **Email All Stories:** This sends the Mailing with all of the stories, regardless of where those stories are targeted.
- **Email Based on Profile of Recipient:** This sends the Mailing with only the appropriate stories based on their target and each person's profile. For example, a Mailing might have two stories: one targeted to News interest and one targeted to Membership interest. If the test recipient's profile only contains the Membership interest, then the recipient would not receive the News story.
- **Email all Versions of the Mailing:** This sends a copy of each possible Mailing. This looks through your targeted subscribers and determines the number of possible variations of the Mailing based on their profiles. It then sends a copy of each variation in Text and HTML formats. For example, if a Mailing has 3 stories each targeted to a different Target Group (Membership, Events and News), some subscribers could receive any of the following:
  - Membership Stories Only
  - Events Stories Only
  - News Stories Only
  - Events & News Stories
  - Membership & Events Stories
  - Membership & News Stories
  - Membership, News & Events Stories

There are 7 different possible Mailings that could be sent. So, one copy of each is sent in Text and HTML format (or 14 Mailings total). If, however, no subscribers were signed up to receive all three types of stories, only 12 Mailings total would be sent as part of the test.



The screenshot shows the 'Test Method' section of a mailing design interface. It features a label 'Email Test Type:' followed by a dropdown menu. The dropdown menu is open, displaying four options: 'Select a test...', 'Email all stories', 'Email based on profile of recipient', and 'Email all versions of mailing'. The first option, 'Select a test...', is highlighted in blue.

After the **Email Test Type** is selected, specify who should receive it. This could be a Test Group, or a list of email addresses with each on its own line. Text can be input and added to the beginning of the subject line when the test is sent. This lets recipients know it is not the published email, but instead is a test. Notes can also be added to the top of the Mailing to include special instructions for the recipients.



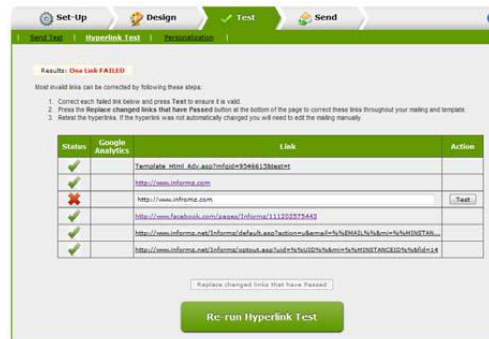
The screenshot shows the 'Test Recipients' and 'Test Options' sections of the mailing design interface. The 'Test Recipients' section has two radio buttons: 'Enter a list of email addresses' (selected) and 'Choose a Test Group'. Below the first radio button is a text input field containing 'support@informz.com'. Below the text input field is a note: 'Add one email address per line, no more than 15.' The 'Test Options' section has two labels: 'Prepend the subject line with:' and 'Add this note to top of mailing:'. The first label has a text input field containing '\*\* Informz Test \*\*'. The second label has a text input field containing 'This is a test mailing from Informz. Please send any comments to Informz (support@informz.com)'. Below the text input field is a note: 'Note: Leave blank to not include any comments'.

## PREVIEW TEST

This is the same test that's available on the **Design** tab. This test displays either the HTML or Text version of the mailing on-screen and then allows that to be emailed to the user.

## HYPERLINK TEST

The Hyperlink test looks at all the links in the Mailing, including those in the stories and those in the Template. It tests each of them to verify they work. If they do not work, the links can be changed from the test window.



In the above example, just change <http://www.informz.com> to <http://www.informz.com>, click the **Test** button to ensure it is valid. Click the **Replace Changed Links** button that have passed to update content.

## PERSONALIZATION TEST

The Personalization test examines the Mailing for personalization fields. It also searches the subscribers targeted in this email to see if any are missing values for this field. It also displays the default value for each personalization field, allowing those default values to be changed if necessary. This test only pertains to Informz **Profile Info** fields.

**Personalization Test**

These personalization fields are used in the mailing.

Field	Default Value
Expiration Date	
Name	Customer

[Save Defaults]

These subscribers are missing information in one or more personalization fields. Their emails will use the Default Values above.

Email	Expiration Date	Name
macavoy@informz.com		X
tarynmor2@yahoo.com	X	X

Note: X denotes a blank field. [Refresh]

## TARGETED SUBJECT LINE TEST

If Targeted Subjects Lines are being used in the Mailing, this displays a count for the subscribers that will receive each of the subject lines.

**Targeted Subject Lines**

Subject	Target Group Name	Count
Membership Update *	Story Level	1
Premium Membership Benefits	Interests : Premium Members	1
Student Membership Benefits	Interests : Student Members	0

\* Default Subject Line

## VIRTUAL INBOX TEST

The Virtual Inbox test shows the Mailing's appearance in many email and mobile clients. It also tests the message against a number of spam filters to see if any are triggered by the Mailing content.

## SEND TAB

The **Send** tab provides the publishing options for the Mailing.

## PREREQUISITES

A Mailing needs a template, a target group, and at least one story. If these prerequisites are not met, the Mailing cannot be sent. The image below shows how a properly configured Mailing is displayed on the Send tab.

Hyperlinks are provided to easily jump back to the Set-Up and Design tabs from this page. Additionally, the **Get Count** hyperlink displays the number of subscribers when a target group is used. (This is not applicable if individual email addresses are used instead of a target group.)

This mailing is ready to be sent

**Verify the following**

**Email header information:**

Name:	2010_Q4_3
Subject:	Membership Update
To:	Story Level
From:	Membership Team (nelson@informz.com)
Reply To:	nelson@informz.com

**Advanced Options:**

Cc:	Not Set
Do not send to:	Not Set
Opt-Out Link:	Remove from Informz: Basic Members
Accounting Code:	test
Auto Activity Transfer:	Not Set

[Return to Set-Up to change these settings](#)

**Target Groups used in the mailing:**

Target Group Name	Action
Interests : Basic Members	<a href="#">Get Count</a>

[Return to Design to change story target group\(s\)](#)

**Send Mailing Now**  
You will be taken to a confirmation screen

**Schedule Mailing**  
You will be taken to a screen to specify sending options

The example below shows a Mailing without a target group. In addition to the message “This Mailing is not ready to be sent,” the **Send Mailing Now** and **Schedule Mailing** buttons are both hidden.

The example below shows a Mailing that’s using a template with an **Opt-Out** link, but the **Opt-Out** settings under the Advanced Options have not been set.

This mailing is not ready to be sent

**Notice:**

- This mailing or its template has an Opt-Out link but it has not been properly set. [Click here](#) to return to Set-Up to change these settings.

**Verify the following**

**Email header information:**

Name:	2010_Q4_3
Subject:	Membership Update
To:	Story Level
From:	Membership Team (nelson@informz.com)
Reply To:	nelson@informz.com

**Advanced Options:**

Cc:	Not Set
Do not send to:	Not Set
Opt-Out Link:	Not Set
Accounting Code:	test
Auto Activity Transfer:	Not Set

[Return to Set-Up to change these settings](#)

**Target Groups used in the mailing:**

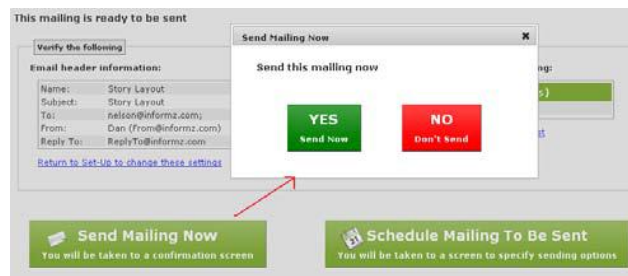
Target Group Name	Action
Interests : Basic Members	<a href="#">Get Count</a>

[Return to Design to change story target group\(s\)](#)

---

## SEND MAILING NOW

Upon clicking the **Send Mailing Now** button, a confirmation page is displayed, ensuring the Mailing is currently ready for publication.



If **Yes** is selected, the Mailing is sent and the following confirmation displays on the **Send** tab.



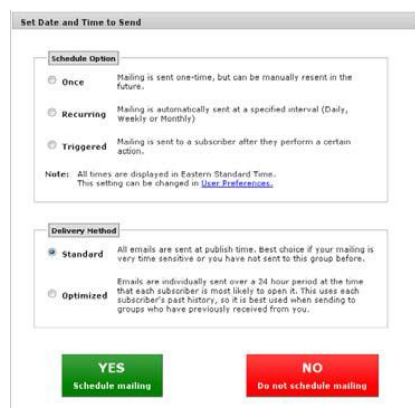
This notice collapses after five seconds.

If **No** is selected, the confirmation screen closes and the **Send** tab re-appears.

---

## SCHEDULE MAILING TO BE SENT

This option presents Schedule and Delivery options.



Choosing **Once** schedules the Mailing for publication one a single date and time.

☒ **Once** Mailing is sent one-time, but can be manually resent in the future.

Date: 9/2/2010 Time: hh 11 mm 00 PM

September 2010

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Choosing **Recurring** schedules the Mailing for publication at the same time on different days.

☒ **Recurring** Mailing is automatically sent at a specified interval (Daily, Weekly or Monthly)

☐ Sun ☒ Mon ☐ Tue ☒ Wed ☐ Thu ☒ Fri ☐ Sat

Time: hh 12 mm 00 PM

Choosing **Triggered** establishes the settings to send a Mailing after a particular event occurs:

1. When a subscriber registers using a Data Input Form. This is also referred to as “subscribing.”
2. When an admin sends a text message with a special keyword, triggering the publication of a Mailing.
3. When a subscriber sends a text message to Informz with a keyword defined in the brand. For example, a subscriber texts XYZSignup, and a Mailing is triggered.

☒ **Triggered** Mailing is sent after subscriber performs a specific action.

☒ 1 day(s) after someone subscribes

☐ Triggered by a Text Messaging Keyword

☐ After someone sends in a Text Message Keyword

The **Delivery Method** options control the way the sent email flows to the subscribers. There are two available methods: **Standard** and **Optimized**.

**Standard** initiates the sending at the scheduled time, sending the Mailing to all the subscribers in the Target Group. This method is appropriate when the content is time-sensitive, e.g. a legislative “call to action” alert, or when there isn’t an extensive publishing history for these subscribers.

**Optimized** analyzes the open history of each individual subscriber and calculates an average open time. Each subscriber’s Mailing is scheduled for that appropriate hourly time slot. For subscribers without history, other calculations are used to determine an appropriate time. Email addresses without history from a country domain (e.g. .ja (Japan), .ca (Canada), .fr (France)) will take an average from all addresses from that particular country. This method is appropriate when the content is not time-sensitive, e.g. a quarterly eNewsletter, or when there is an extensive publishing history to these subscribers.

Once the Mailing has been scheduled, a confirmation screen displays:

Set-Up Design Test Send

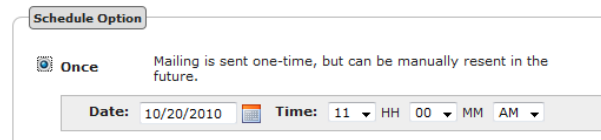
This mailing will be sent on Thursday September 30, 2010 at 8:00:00 AM (Eastern Standard Time)

**STOP!** Cancel sending

Change the send options

[Click Here to return to the mailing list page](#)

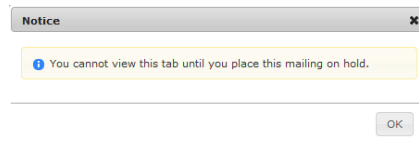
To put the Mailing on hold, click the **Stop!** button. This prevents the Mailing from being sent. To simply alter the date, time or delivery option, use the **Change the Send Options** button. If no changes are needed to the **Set Date and Time to Send** pop-up, simply click the "X" in the upper right corner to close the pop-up and no change is recorded.



The 'Schedule Option' dialog box contains a radio button labeled 'Once' which is selected. To its right, text reads: 'Mailing is sent one-time, but can be manually resent in the future.' Below this, there is a 'Date' field with the value '10/20/2010' and a 'Time' field with the value '11:00 AM'. The time field is split into 'HH' (11), 'MM' (00), and 'AM' (AM) dropdown menus.

**Note:** Once a Mailing is scheduled, the **Set-Up** and **Design** tabs are no longer available. This prevents an inadvertent change to the Mailing just prior to publication. If a change to the content is required, use the **Stop!** button to put the Mailing on hold, and then proceed with the edits.

The **Test** tab is available to review the content, even while the Mailing is scheduled to be sent.



The 'Notice' dialog box has a title bar with the word 'Notice' and a close button (X). The main area contains a yellow message box with an information icon and the text: 'You cannot view this tab until you place this mailing on hold.' An 'OK' button is located at the bottom right of the dialog.